



GAVIN NEWSOM
GOVERNOR

STATE OF CALIFORNIA
GOVERNOR'S OFFICE OF BUSINESS AND ECONOMIC DEVELOPMENT (GO-BIZ)
CALIFORNIA INFRASTRUCTURE AND ECONOMIC DEVELOPMENT BANK (IBANK)

POSITION DUTY STATEMENT

Classification Title Senior Loan Officer (Supervisor)	Unit Climate Financing	Name
Working Title Climate Financing Senior Loan Officer	Position Number 373-105-7484-004	Effective Date

GENERAL STATEMENT:

Under the general direction of the Deputy Director for Climate Finance (Supervisor), the Senior Loan Officer (Supervisor) performs technical analysis and time-sensitive duties related to the IBank's Climate Catalyst Fund and other climate financing programs. The Senior Loan Officer (Supervisor) is the subject matter expert who performs and leads the credit underwriting activities and determines eligibility requirements are adhered to for the various climate financing mechanisms. The Senior Loan Officer (Supervisor) is expected to exercise individual initiative, utilize goal setting, possess strong work ethics, and meet deadlines. The Senior Loan Officer (Supervisor) duties include, but are not limited to, the following:

ESSENTIAL FUNCTIONS:

45%	The Supervisor is responsible for the supervision, monitoring, and evaluating the work products and performance of the Climate Financing staff. The Supervisor coordinates and manages the workflow of the unit, prepares duty statements, participates in the hiring process and serves on interview and examination panels. The Supervisor is responsible for preparing staff probation and performance reviews to ensure adequate and appropriate documentation as well as develop and implement training as needed, including the preparation of individual development plans. The Supervisor will lead the oversight and follow-up of climate financing agreements, including post-financing monitoring activities. Maintain files, correspondence, account balances, and other information associated with climate finance agreements issued by IBank. Monitor compliance with disclosure requirements. Prepare and submit evaluations of any financing performance issues. Conduct program analysis and prepare statistical, ad hoc and anecdotal reports. Track and analyze pending and approved legislation that relates to climate finance. Respond to requests from communities and potential applicants for technical assistance on applying for climate financing.
40%	Exercise a high-level of independence to support the planning, organization and execution of all aspects of the Climate Financing loan programs. Respond to inquiries from external parties; review loan applications, perform financial analysis, perform all processes of underwriting, produce and evaluate staff reports (credit memorandum) for loan requests. The Supervisor shall have and maintain

	a high level of expertise in financings including climate finance. The Supervisor will lead, manage, direct, train, and provide oversight to staff in the areas of loan origination, financial analysis (underwriting), in the unit. The supervisor will provide direction and oversight for the preparation of credit memorandums and staff reports presented to the IBank Board of Directors with respect to all climate financings. Supervisor will respond to the most sensitive or difficult inquiries from interested parties, applicants, borrowers, local governmental officials, and public finance professionals regarding the guidelines, process, policy and procedures of the Climate Financing Programs. The Supervisor will ensure the maintenance of the approved financings, oversee the preparation and ensure the accuracy of data provided for various reports, including but not limited to the annual report to the Legislature, including the accomplishments table. Recommend policy, procedures, and business processes to the Deputy Director for Climate Finance regarding all necessary or required procedures, guidelines, and documents relating to the functions of the Climate Financing Loan Programs.
10%	Serve and attend IBank's internal committee meetings. Attend and present financing requests to the Board of Directors (IBank Board) for approval consideration. Ensure accuracy and timeliness of data included in the annual reports to management, the rating agencies, and the Legislature.
5%	Participate in staff meetings, financing program and management activities, provide work status reports, handle special projects, and other duties as assigned.

SUPERVISION EXERCISED
The Senior Loan Officer (Supervisor) will provide supervision to staff in the Climate Financing Unit.

SUPERVISION RECEIVED
The Staff Loan Officer (Supervisor) will work under the general supervision of the Deputy Director for Climate Finance.

PUBLIC AND INTERNAL CONTACTS
During the course of work, the Senior Loan Officer (Supervisor) has regular and frequent contact with governmental agencies, high-level members of business and economic development communities, private citizens and appointed and elected officials. These contacts command a high degree of sensitivity and awareness of the functions and interrelations of various government and private organizations.

INITIATIVE AND INDEPENDENCE OF ACTION
<u>Management/Supervisory:</u> This position requires a high degree of administrative, technical and management capability over extremely sensitive economic development projects. The incumbent is relied upon to develop and ensure the completion of assignments and delegates work in complex situations with or without direct supervision. The ability to set and manage priorities, develop policy for all programs and ensure completion of work is required. This position also requires a high level of problem-solving, technical skill, perceptive judgment, independence of action and accurate assessment of intricate situations. This position requires a certain degree of logical, technical and analytical capability to assist with resolving complex financing issues and problems. This position also requires independent review and analysis of loan applications for financing and ability to prepare clear and concise technical reports for public dissemination and speak with confidence in public. The incumbent is relied upon to develop and ensure the completion of assignments in complex situations and develop alternatives and recommend a course of action demonstrating initiative, creativity and flexibility. In addition, the incumbent is expected to work independently with communities, economic development organizations, and other parties to identify and assist projects eligible for green financing.

CONSEQUENCE OF ERROR

This is a high-profile position within IBank. The effective administration and oversight of IBank's Climate Financing Programs are critical to IBank's mission in general. The Senior Loan Officer (Supervisor) must identify and resolve problems and issues that adversely affect the efficiency, effectiveness, and fiscal integrity of IBank's Climate Financing Programs and IBank generally. Any errors or delays in actions may reflect badly and cause embarrassment to the State of California, GO-Biz, IBank, and the Governor's Office, and may lead to potential lawsuits or regulatory action by agencies that oversee municipal finance transactions.

CERTIFICATION

This position statement fairly represents the responsibilities and reporting relationship of the position. If any aspect of this statement is substantially changed, a new statement will be prepared and submitted to the Human Resources Office.

I have read and understand the duties listed above and can perform them either with or without reasonable accommodation. Reasonable accommodation needs should be discussed with your hiring supervisor. If you are unsure whether you require reasonable accommodation, please inform your supervisor who will discuss your concerns with the Reasonable Accommodation Coordinator.

EMPLOYEE'S ACKNOWLEDGEMENT: *I HAVE DISCUSSED WITH MY SUPERVISOR THE DUTIES OF THIS POSITION AND HAVE RECEIVED A COPY OF THE DUTY STATEMENT*

The statements contained in this duty statement reflect general details as necessary to describe the principal functions of this job. It should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned, including work in other functional areas to cover absence of relief, to equalize peak work periods or otherwise balance the workload.

Employee Name (Printed)	Employee Signature	Date
<i>Senior Loan Officer (Specialist)</i>		

SUPERVISOR'S ACKNOWLEDGEMENT: *I HAVE DISCUSSED THE DUTIES OF THIS POSITION WITH AND HAVE PROVIDED A COPY OF THIS DUTY STATEMENT TO THE EMPLOYEE NAMED ABOVE.*

Supervisor's Name (Printed)	Supervisor Signature	Date
<i>Deputy Director for Climate Finance</i>		